

U.S. Department of Commerce  
International Trade Administration



Office of Travel and Tourism Industries

# **2012** Sector Profile: Leisure



# 2012 Industry Sector Profile: Leisure

## Overseas Leisure Visitors

[thousands of visitors]	2005	2006	2007	2008	2009	2010	2011	2012	Change 2012/2005
Overseas Visitors <sup>(1)</sup>	13,397	13,196	14,192	16,092	15,560	17,900	18,849	19,970	6,573
% Change	6	-2	8	13	-3	15	5	6	49%
Share of Overseas Visitors	61.8	60.9	59.4	63.5	65.5	67.9	67.6	67.1	
Point Change in Share	-0.5	-0.9	-1.5	4.1	2.0	2.4	-0.3	-0.5	5.3

## Country of Origin of Leisure Visitors

Visitor Origin	Market Share 2011 (Percent)	Volume 2011 (000)	Market Share 2012 (Percent)	Volume 2012 (000)
<b>WORLD REGIONS</b>				
Europe	48.9	9,217	44.9	8,967
Asia	25.6	4,825	25.6	5,112
South America	14.8	2,790	17.8	3,555
Oceania	5.5	1,037	5.5	1,098
Caribbean	1.7	320	1.8	359
Middle East	1.6	302	1.8	359
Africa	0.5	94	0.6	120
<b>COUNTRIES OF RESIDENCE</b>				
Japan	15.6	2,940	15.6	3,115
United Kingdom	16.2	3,054	15.0	2,996
Brazil	7.0	1,319	7.6	1,518
Germany	6.8	1,282	6.6	1,318
France	5.7	1,074	5.5	1,098
Australia	4.7	886	4.7	939
Korea, South	3.6	679	3.7	739
P. R. of China	3.0	565	3.1	619
Italy	3.5	660	2.9	579
Argentina	**	**	2.8	559
Netherlands	2.3	434	2.2	439
Spain	3.1	584	2.2	439
Switzerland	2.1	396	1.9	379
Ireland	1.5	283	**	**
R. of China (Taiwan)	0.9	170	**	**

# 2012 IndustrySector Profile: Leisure

## Information Sources Used to Plan Trip by Leisure Visitors

	Information Sources Used	2011 (Percent)	2012 (Percent)	Point Change (2)
	Airlines (Directly)	22	43	21.0
	Corporate Travel Dept.	2	7	4.6
	Travel Guide(s)	11	17	5.4
2012	Personal Recommendation (Friends/Rel)		28	
2011	Friends/Relatives	18		
2012	National/State/City Travel Office		11	
2011	Nat'l Govt. Tourist Ofc.	2		
2011	State/City Travel Ofc.	4		
2012	Tour Operator/Travel Club		10	
2011	Tour Company	9		
2012	Online Travel Agency (OTA)		34	
2012	Travel Agency Office		27	
2011	Travel Agency	38		
2012	Other		5	
2011	TV/Radio	1		
2011	Personal Computer	50		
2011	In-flight Info. Systems	2		
2011	Newspapers/Magazines	4		

## Main Purpose of Trip

	Main Purpose of Trip	2011 (Percent)	2012 (Percent)	Point Change (2)
	Convention/Conference/Trade Show	2	2	0.2
	Visit Friends/Relatives	12	9	-3.6
	Health Treatment	0.1	0.1	0.0
	Religion/Pilgrimages	0.1	0.1	0.0
2012	Business		2	
2011	Business/Professional	4		
2012	Vacation/Holiday		85	
2011	Leisure/Rec./Holidays/Sightseeing	79		
2012	Education		2	
2011	Study/Teaching	2		
	Other	0.3	0.4	0.1

# 2012 IndustrySector Profile: Leisure

## All Purposes of Trip

	Purpose of Trip	2011 (Percent)	2012 (Percent)	Point Change (2)
	Convention/Conference/Trade Show	4	4	0.0
	Visit Friends/Relatives	27	24	-2.3
	Health Treatment	0.3	0.4	0.1
	Religion/Pilgrimages	0.3	0.4	0.1
2012	Business		4	
2011	Business/Professional	7		
2012	Vacation/Holiday		100	
2011	Leisure/Rec./Holidays/Sightseeing	100		
2012	Education		4	
2011	Study/Teaching	3		
	Other	1	1	0.1
	NET PURPOSES OF TRIP:			
	Leisure & VFR	100	100	0.0
	Business & Convention	10	7	-2.9

## Transportation Used in United States by Leisure Visitors

	Transportation Types Used in United States	2011 (Percent)	2012 (Percent)	Point Change (2)
	Airlines in U.S.	26	31	5.3
	Bus between Cities	13	20	7.8
	City Subway/Tram/Bus	32	36	4.3
	Company or Private Auto	20	28	7.7
	Railroad between Cities	12	7	-4.8
	Motor Home/Camper	1	1	0.0
	Rented Auto	32	37	4.3
	Taxi/Cab/Limousine	42	35	-7.0
2012	Cruise Ship/River Boat 1+ Nights		5	
2012	Ferry/River Taxi/Short Scenic Cruise		13	
2012	Rented Bicycle/Motorcycle/Moped		3	



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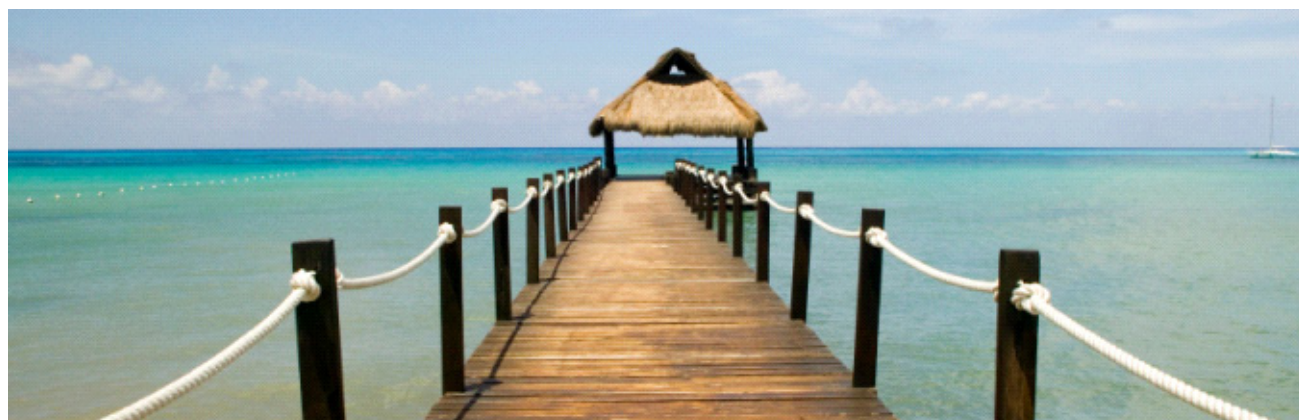
## Activity Participation While in the United States

	Activity Participation While in the U.S.	2011 (Percent)	2012 (Percent)	Point Change (2)
	Amusement/Theme Parks	36	32	-3.8
	Art Gallery/Museum	27	31	4.6
	Sporting Event	7	12	4.7
	Camping/Hiking	5	5	-0.1
	Casino/Gambling	12	11	-1.6
	Concert/Play/Musical	19	21	1.4
	Environ./Eco. Excursions	4	4	-0.2
	Golfing/Tennis	4	5	0.1
	Guided Tours	23	29	6.3
	Hunting/Fishing	2	2	0.1
	Nightclubs/Dancing	13	16	2.7
	Shopping	92	91	-0.7
	Visit American Indian Communities	4	6	1.4
2012	Cultural / Ethnic Heritage Sites		18	
2011	Cultural Heritage Sites	29		
2011	Ethnic Heritage Sites	5		
2012	Experience Fine Dining		39	
2011	Dining in Restaurants	85		
2012	Sightseeing		84	
2011	Sightseeing in Cities	52		
2012	Snow Sports		1	
2011	Snow Skiing	2		
2012	Small Towns/Countryside		29	
2011	Visit Small Towns/Villages	31		
2011	Touring Countryside	22		
2012	National Parks/Monuments		38	
2011	Visit National Parks	24		
2012	Water Sports		13	
2011	Water Sports/Sunbathing	26		
2012	Visit Historical Locations		30	
2011	Visit Historical Places	48		
2012	Other		1	
2011	Cruises	10		
2011	Ranch Vacations	2		

# 2012 IndustrySector Profile: Leisure

## Select Traveler Characteristics of Leisure Visitors

Traveler Characteristics	2011	2012	Change (2)
Advance Trip Decision Time (mean days)	109	108	-1.2
Advance Trip Decision Time (median days)	90	90	0.0
Prepaid Package	22	24	2.3
First International Trip to the U.S.	33	26	-6.2
Length of Stay in U.S. (mean nights)	14.7	14.5	-0.2
Length of Stay in U.S. (median nights)	10	9	-1.0
Number of States Visited (% 1 state)	65	69	3.5
Average Number of States Visited	1.6	1.5	-0.1
Hotel/Motel (% 1+ nights)	84	83	-1.5
Average # of Nights in Hotel/Motel	8.5	8.9	0.4
Travel Party Size (mean # of persons)	1.8	1.9	0.1
Gender: % Male (among adults)	52	49	-3.1
Household Income (mean average)	\$91,500	\$97,773	\$6,273
Household Income (median average)	\$79,300	\$72,000	-\$7,300
Average Age: Female	38	38	-0.3
Average Age: Male	42	41	-1.4



# 2012 IndustrySector Profile: Leisure

## U.S. Destinations Visited by Overseas Leisure Visitors

Visitation to U.S. Destinations/Regions (3)	Market Share 2011 (Percent)	Volume 2011 (000)	Market Share 2012 (Percent)	Volume 2012 (000)
<b>REGIONS</b>				
Middle Atlantic	39.5	7,445	36.0	7,189
South Atlantic	31.7	5,975	33.7	6,730
Pacific	22.9	4,316	19.9	3,974
Pacific Islands	17.1	3,223	18.8	3,754
Mountain	15.8	2,978	13.9	2,776
East North Central	4.6	867	5.0	999
New England	5.6	1,056	5.0	999
West South Central	4.0	754	4.0	799
<b>STATES</b>				
New York	37.6	7,087	34.3	6,850
Florida	23.8	4,486	26.7	5,332
California	21.5	4,053	18.8	3,754
Hawaiian Islands	10.9	2,055	12.5	2,496
Nevada	13.0	2,450	11.6	2,317
Guam	6.2	1,169	6.3	1,258
Massachusetts	4.7	886	4.3	859
Illinois	3.3	622	3.6	719
Arizona	3.7	697	3.2	639
Texas	2.6	490	2.9	579
Pennsylvania	2.6	490	2.7	539
New Jersey	2.8	528	2.4	479

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## U.S. Destinations Visited by Overseas Leisure Visitors

Visitation to U.S. Destinations/Regions (3)	Market Share 2011 (Percent)	Volume 2011 (000)	Market Share 2012 (Percent)	Volume 2012 (000)
<b>CITIES</b>				
New York City	37.1	6,993	33.8	6,750
Orlando	13.1	2,469	14.6	2,916
Miami	12.1	2,281	13.6	2,716
Los Angeles	14.2	2,677	11.9	2,376
Las Vegas	12.7	2,394	11.3	2,257
San Francisco	11.3	2,130	10.3	2,057
Oahu/Honolulu	8.7	1,640	10.1	2,017
Washington, DC	6.8	1,282	5.8	1,158
Boston	4.4	829	4.0	799
Chicago	3.2	603	3.5	699
San Diego	2.7	509	2.7	539
Flagstaff-Grand Canyon-Sedona	2.9	547	2.5	499
Philadelphia	1.7	320	1.7	339

(1) Overseas includes all countries except Canada and Mexico.

(2) Percentage-point and percentage changes are based on non-rounded data.

(3) "Only census region, state, and city destinations having a sample size of 400 or more are displayed.

Due to quarterly data weighting by country and port of entry, some unreported destinations may have a higher proportion of total than those reported."

(\*\*) Estimate not shown due to sample size fewer than 400 for this year.

Note: Estimate not shown due to sample size fewer than 400 for this year. This profile shows only a portion of the 35 travel characteristics data in 2011 and the 37 items reported on international arrivals to the U.S. Additional information may be obtained for a fee.

To learn more, please visit our website: <http://tinet.ita.doc.gov/research/programs/ifs/index.html>

For a list of the states that comprise each census region, please visit: [http://tinet.ita.doc.gov/outreachpages/census\\_regions.html](http://tinet.ita.doc.gov/outreachpages/census_regions.html)

Interested in data for your destination? OTTI sells custom reports. To learn more, go to:

<http://www.tinet.ita.doc.gov/research/programs/ifs/customized.html>

Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries; Bureau of Economic Analysis

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## Survey of International Air Travelers

The Survey of International Air Travelers provides a level of detail and insight into the traveler characteristics and travel patterns of international visitors to and from the United States not found elsewhere. Responses are weighted with data from the Department of Homeland Security and the following thirty-five tables are then populated. This report, which was constructed using just a fraction of the data available, summarizes what we know about the overseas leisure traveler who visits the United States.

**Survey of International Air Travelers: Table Number and Description**

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# Interested in obtaining data for your organization?

OTTI collects, analyzes and disseminates international travel and tourism statistics from the U.S. Travel and Tourism Statistical System and produces visitation data tables, including a business and pleasure arrivals rate of change analysis and detailed region, country and port analyses.

To learn more, you are encouraged to visit:

<http://tinet.ita.doc.gov/research/programs/ifs/customized.html>

## For OTTI programs of interest visit:

<http://www.tinet.ita.doc.gov/research/index.html>

- Summary of International Travel to the United States (I-94)
- U.S. International Air Traveler Statistics (I-92)
- Canadian Statistics
- Survey of International Air Travelers (SIAT)
- Forecast of International Arrivals to the United States
- U.S. Travel and Tourism Exports, Imports and the Balance of Trade
- U.S. Travel and Tourism Satellite Accounts
- Travel Trade Barometer

### **U.S. Department of Commerce**

International Trade Administration  
Manufacturing and Services  
Office of Travel and Tourism Industries  
1401 Constitution Ave, NW  
Washington, D.C. 20230  
Phone: (202) 482-0140  
Fax: (202) 482-2887  
[otti@trade.gov](mailto:otti@trade.gov)

# <http://tinet.ita.doc.gov>